FREE TAX ASSISTANCE OFFERED

Tax Counseling for the Elderly (TCE) volunteers offer FREE Income Tax Preparation Assistance to electronically file federal and state income taxes, including the "homestead credit."

The Tax Counseling for the Elderly program, is co-sponsored by the IRS and AARP. It provides free personal income tax assistance, and free e-filing, to low-to-moderate income taxpayers with an emphasis on those over 60. Although there are certain types of tax situations such as rental property, farm or business income that are not covered by the program, the volunteers will be able to assist **most** area residents.

The FDL Senior Center Tax Counseling for the Elderly site, located at 151 E. First Street

Tuesday—Thursday 8:30 a.m.—4:30 p.m.
from February 2 through April 13

The program provides federal tax, state tax, and homestead credit assistance. **Appointments for *FREE* tax assistance can be made at the front desk or by calling 322-3630 on or after January 25.** One tax return per appointment (if you need two tax returns done, you will need to schedule two appointments).

IMPORTANT DOCUMENTS TO BRING

You should bring:

- Government issued identification
- Last year's tax return
- Social Security cards or other official documentation for yourself and all dependents
- Checkbook or pre-printed direct deposit information for your reloadable prepaid card showing routing number and direct deposit account number if you want to do a direct deposit of any refund(s).

Income

- W-2 from each employer
- Unemployment compensation statements
- SSA-1099 form showing the total Social Security benefits paid to you for the year, or Form RRB-1099, Tier 1 Railroad Retirement benefits
- 1099 forms reporting interest (1099-INT), dividends (1099-DIV), proceeds from sales (1099-B), as well as documentation showing the original purchase price of your sold assets
- 1099-R form if you received a pension or annuity, especially if you had a portion withheld for income tax purposes
- 1099-MISC form showing any miscellaneous income

Payments

You will need to bring all forms and canceled checks indicating federal and state income tax paid (including quarterly estimated tax payments).

Deductions

Most taxpayers have a choice of taking either a standard deduction or itemizing their deductions. If you have a substantial amount of deductions, you may want to itemize. You will need to bring the following information:

- 1098 form showing any home mortgage interest
- Receipts or canceled checks for medical/dental expenses (including doctor and hospital bills and medical insurance premiums), receipts for prescription medications, costs of assisted living services and bills for home improvements, such as ramps and railings for people with disabilities
- Receipts for contributions to charity
- Receipts or canceled checks for all tax income and property taxes you paid, as well as records of tax refunds

Credits

- Dependent care provider information (name, employer ID or Social Security number)
- Receipts, canceled checks or 1099 forms related to continuing education

Affordable Care Act (ACA) Information

Be sure to bring relevant documents with you to prove you are in compliance with the ACA. **You will need one of the following:**

- Documentation proving health care coverage for you, your spouse and all your dependents
- Information indicating that you were covered for at least nine months of the year
- Form 1095-A (which you will receive by Jan. 31, 2016) if you purchased insurance through the Marketplace/Exchange
- Documentation of a Health Care Exemption received from the IRS or the Marketplace/Exchange

PLEASE ARRIVE AT LEAST 15 MINUTES EARLY FOR YOUR TAX AIDE APPOINTMENT!

If you have an appointment and are sick or not feeling well, or can otherwise not make your appointment,
please call to cancel your appointment and reschedule.
ONE TAX RETURN PER APPOINTMENT

The Senior Center will begin scheduling appointments on Monday, January 25, 2016

TO MAKE AN APPOINTMENT, CALL 322-3630.